vmware® PARTNER NETWORK

VMware Solution Exchange

Partner User Manual

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VSX Partner Tasks

The following tasks can be performed by any VSX partner.

How to Use Search

Use VSX's search functionality to find the right solution to meet your company's needs.

To use search, type in a keyword in the text box and any company or solution profile that contains that keyword will appear in the search results.

Another way to search is by clicking on the appropriate category on the right hand side of the dashboard and narrowing your search by Technology Type, Industry Type, or VMware Product.

Search will save the last five searches and search results, along with the last five recently viewed solutions.

Personal Account Settings

### Email Management

This option changes the email address with which you will log in, receive notifications, and so on.

Password Management

This option allows you to change your password to a new one. Note that passwords must be at least **8 characters** in length and must include characters from three out of the following four types:

- upper case
- lower case
- digits
- special characters

Request Info/Contact a Sales Person
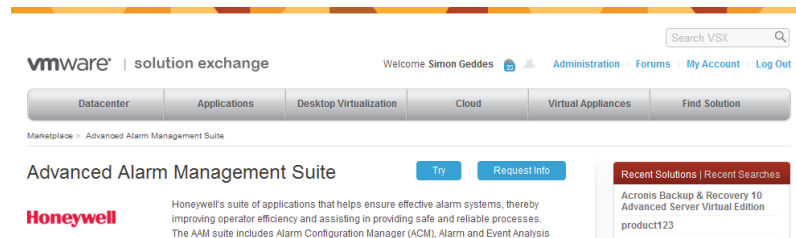
To contact a representative of a company and start sales activity around purchasing a solution you require:

1. Find a solution that will satisfy your business needs.

2. Click on *Request Info*.

3. Pop up **Request More Information** form appears.

4. Fill out the form and click *Submit Request*. A confirmation screen appears.

The company is notified about your request and will get back to you as soon as possible.

Forums

Forums are discussion topics within the solution exchange that are only accessible to partners. They allow VMware admins and partners to converse and generate chat around topics set forth by VMware. This will play as a key knowledge base moving forward.

How do I contribute to a forum?

Only VMware Moderators can start a Forum, but any partner can initiate or contribute to discussion within a forum.

1. Click on *Forum* that is located beside the *Administrator* link on the left-hand side of the dashboard.

2. View the forums that are currently available.

3. Select the forum you wish to contribute to or read further into. You are now able to create a new topic or contribute to existing threads.

   • To create a new topic or thread, click *New Topic/Thread* in the upper right side of the screen, then fill out the fields in the popup and click *Create*.
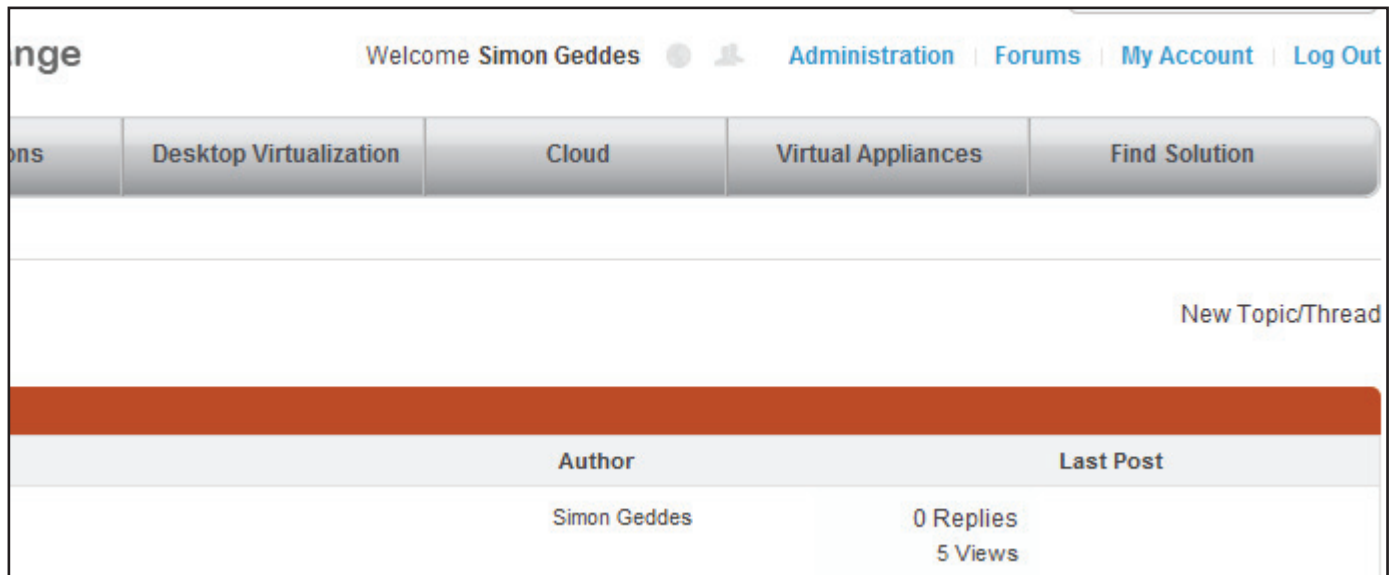
- To read an existing thread, click the topic name in the *Topic* list. You can now read the thread.
- To post a reply, click *Post Reply* in the upper right corner of the screen.
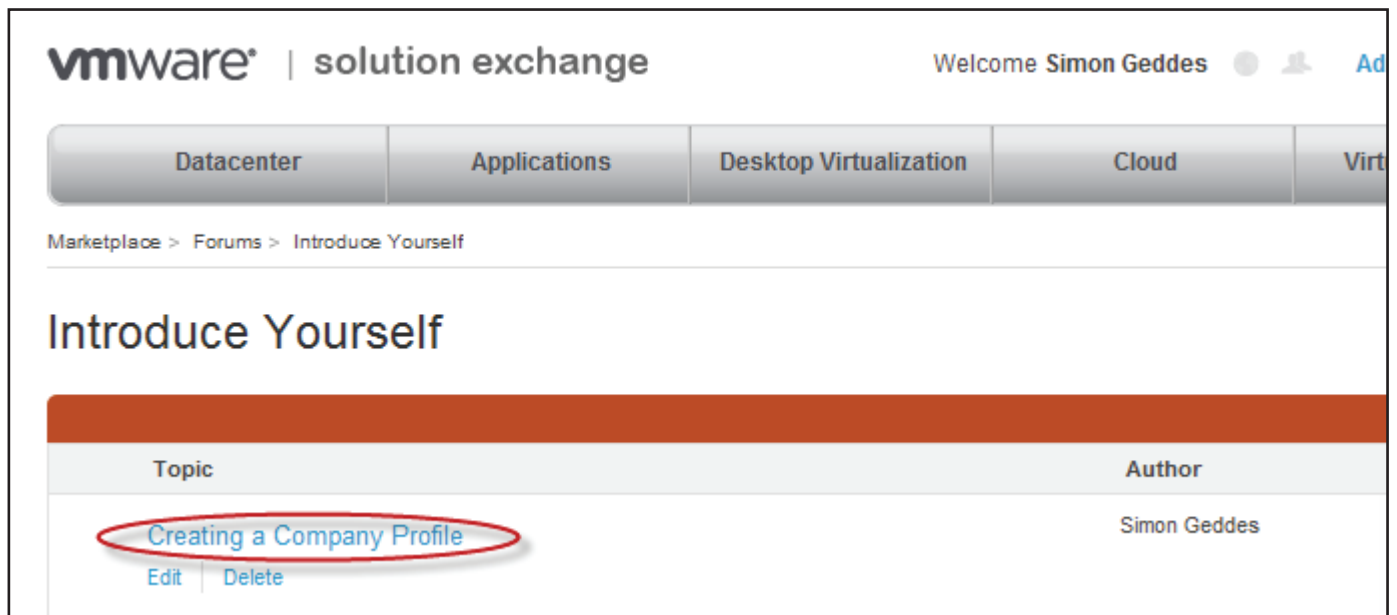
My Company

Your company profile allows you showcase your company and its solutions to the broader VMware Solution Exchange community.

How do I edit my Company profile?

To edit your company's profile, click on the *Administration* link that can be found in the top right hand corner of the dashboard. Then click on *Manage My Company*. Here you can:

- Add/change/remove your company's URL
- Add or remove a company logo that will appear beside the company profile (valid image formats are jpg, gif, png, and bmp)
- Edit the company description
- Select/Change/update your company's solution(s) play in

Under *Contact Information*, you can:

- Edit display name for address and phone number
- Add/update your company's contact information like address and phone number
- Add additional company contact information that you have.

Notifications

On creation of an opportunity and lead, a notification will be sent to sales managers. Sales reps and admins will get notifications on any leads and opportunities that are assigned to them. A few examples of notifications are:

- Whenever a lead/opportunity has been created
- Whenever a lead/opportunity has been assigned to a sales rep or admin
- Whenever a lead/opportunity has been updated
- Someone adds a lead or opportunity to your sales pipeline (only admins, sales managers and affected sales reps will get notifications)

A quick summary of your notifications is shown next to your name. By clicking on any of these notifications, it will take you to a more detailed view on your notifications page. Each notification will be sent to your registered email address as well, so you will know in real time when people interact with you within the VMware Solution Exchange Sales Pipeline.

Manage Products

How do I add a new product?

To add/edit a product, click on the *Administration* link that can be found in the top right hand corner of the dashboard. Then click on *Manage Products*.   Here you can add and edit your company's products
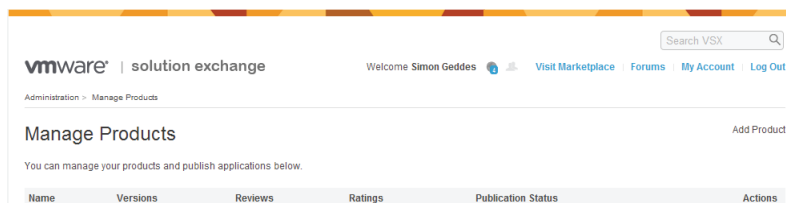
To add a product, click on *Add Product* located at the top right hand corner of the screen. You will then be prompted to choose a product type.

- Download: Product is available to be downloaded directly from the VMware Solution Exchange

- External Link: The product is available online

You will then be asked to fill out the following fields:

- Name
- Version Identifier
- If the product is a Download, upload the new file
- Long Description
- Application Images
  - Icon
  - Screenshots
- Categories
- Overview
  - Highlight 1
  - Highlight 2
  - Highlight 3
  - Description
- Details
  - Description
- Partners
  - Systems Integrator, Hosting/Service Providers, Resellers, Other
    - Partner
    - Competency
    - Country
    - State/Province
- Support
- Solution Support Statement
- Compatibility
  - VMware
    - Product
    - Version
  - Partner
    - Product
    - Version
  - Support Contact
    - Support Hours
    - Support Phone Numbers
    - Support Website

- Support Email
- Resources
- Joint Solution Briefs
  - Datasheets
  - Deployment Guides
  - Whitepapers
  - Architecture Design Guides
  - Success Stores
  - Demos
- Upload related product images and files

How do I update a product?

The following screen allows you to add or edit your company's products.

To update a product or modify any of the fields listed above, click the product's *Edit* button.

How do I create a new version?

To update your product to a newer version, click on *New Version* in the **Manage Products** screen. Here you can:

- Upload the new file
- Fill out the *What's New* field
- Update any of the current fields

Manage People

To add employees and manage their roles or assign them to a group, click on the *Administration* link that can be found in the top right hand corner of the dashboard. Then click on *Manage People*.
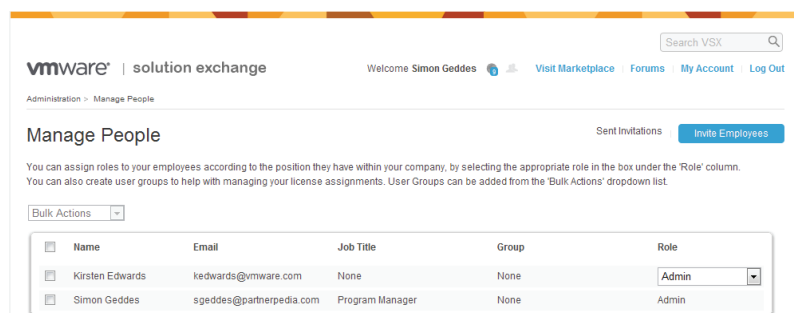
How do I assign roles?

You can assign roles to your employees according to the position they have within your company, by selecting the appropriate role in the box under the *Role* column.

You can also create user groups to help with managing your license assignments. User Groups can be added from the *Bulk Actions* dropdown list.

To change an employee's role:

1. Click on the *Administration* link on the top right hand corner of the dashboard
2. Click on *Manage People*.

Here you can change an employee's role to:

- Admin
- Employee
- Sales Manager
- Sales Rep

Activity	Role			
	Admin	Sales Manager	Sales Rep	Employee
Create an Opportunity	Y	Y	Y	
Create a Lead	Y	Y	Y	Y
Create an Account	Y	Y	Y	
Assign Sales Rep	Y	Y		
Edit a Lead	Y	Y	Y	
Edit an Opportunity	Y	Y	Y	
Edit an Account	Y	Y	Y	
Notifications	Y	Y	Y	
Reports	Y	Y		
Re-Assign roles	Y			

How do I Invite Employees?

1. Click on the *Invite Employees* button to the right.

2. Download the sample Excel file spreadsheet, fill in the required fields and then upload that file.

3. Customize a message to your colleagues before sending the invitation or simply go with the default message provided.

4. When you're, ready click on *Send Invitations*.

The invitation to join the VSX has now been sent, and on the sent invitations page you can see which employees you've invited and what their status is.

- Pending denotes an invite that has yet to be accepted.

- Employee status denotes the invitation was accepted.

Manage Sales Pipeline

Here you can manage your leads and opportunities.

1. Click on the *Administration* link that is located on the top right hand corner of the dashboard.

2. Click on *Sales Pipeline*. The Sales Activity screen appears. Here you can add leads, accounts and opportunities. You can also view all existing leads, opportunities and accounts.

Sales Activity

Leads   View All | Add Lead

A lead is the identity of a person or entity potentially interested in purchasing a product or service, and represents the first
stage of a sales process. The lead may have a corporation or business associated with the person(s).

Name	Account	Status	Owner	# of Opps	Created Date
No leads exist.					

Accounts [1]   View All | Add Account

An account is a collection of the information that makes up a company that you are tracking.

Name	Phone Number		Website
opp2	-		-

Opportunities [1]   View All | Add Opportunity

Opportunities are potential sales that are associated to a Lead and Organization - either an existing customer or prospect.
Opportunities provide visibility into account balances, sales quotes, and sales orders.

Name	Account	Stage	Deal Status	Amount	Close Date
Opp2	opp2	Qualification	Registered to VMware	$ 1,523.00	June 17, 2011

Sales Pipeline Reports

Get reporting on your leads and reporting, To generate your Sales Reports:

Administration

Manage Products
Add and edit your company's products.

Manage People
Update existing employees roles or remove
them from your company.

Manage My Company
Update information and settings of my
company.

Sales Pipeline
Manage your Leads and Opportunities.

Sales Pipeline Reports
Get reporting on your Leads and
Opportunities.

1. Click on the *Sales Pipeline Reports* link that is located on the bottom left corner of the Administration dashboard

2. Click on *Sales Pipeline Reports*.

vmware | solution exchange   Welcome **Stuart McCrae**   Visit Marketplace | Forums | My Account | Log Out

Reports

Leads by Status

The Leads by Status report allows you to
view the status of all leads based on status
and time frame.

Opportunities by Stage

The Opportunities by Stage report allows
users to view reports based on
opportunities by stage.

You now have the option to either generate reports for:

- Leads by Status
- Opportunities by Stage

The *Leads by Status* report allows you to view the status of all leads based on status and time frame. Here you select the
timeframe for which you want to generate your reports. The date format must be in DD-MM-YYYY.

Each status is broken down into five types:

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- New
- Contacted
- Warm
- Qualified
- Purge.

Leads By Status

The Leads by Status report allows you to view the status of all leads based on status and time frame. Each status is broken down into 5 types: New, Contacted, Warm, Qualified and Purge.

Please select an option by which you would like to filter this report on.

● Filter report by date range	Filter report by date range
○ Filter report by a particular month	Start date: 13-06-2011 End date: 19-06-2011
	Generate Report

The *Opportunities by Stage* report allows users to view reports based on opportunities by stage. Click *Generate Report* and your results will appear on the page plus the ability to export your results to CSV.

Stages include:

- Prospecting
- Qualification
- Needs
- Analysis
- Proposal / Price Quote
- Negotiation/Review
- Closed Won
- Closed Lost

Opportunities By Stage

This report allows users to view reports based on opportunities by stage. Stages include Prospecting, Qualification, Needs Analysis, Proposal/Price Quote, Negotiation/Review, Closed Won and Closed Lost.

Please select an option by which you would like to filter this report on.

● Filter report by date range	Filter report by date range
○ Filter report by a particular month	Start date: 13-06-2011 End date: 19-06-2011
	Please select the event you would like to generate this report on. Creation Date ▼
	Generate Report

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